





# **AERC RECYCLING**

# SECURE DATA DESTRUCTION AND SURPLUS (SDDS)

VA-040917-DYNT

SDDS REGISTRATION INSTRUCTIONS GETTING STARTED DOCUMENT 1 OF 3

VERSION 2.0

https://www.covsdds.com

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# **Introduction to Secure Data Destruction and Surplus**

AERC.COM, Inc. (AERC Recycling) is proud to have been awarded the Secure Data Destruction and Surplus (SDDS) contract, VA-040917-DYNT by Virginia Information Technologies Agency (VITA) in October 2004. AERC has been working diligently to maintain and grow the program that allows qualified organizations use of the SDDS system to surplus all qualified technology devices within the Commonwealth of Virginia. AERC continues the strategy of the SDDS online system...creating a long-term surplus application that is available to all users of the SDDS contract.

Highlights of the SDDS system are as follows:

- > Internet based.
- > Secure 128 Bit SSL encrypted site to protect your information.
- > Username and Password protected.
- Tiered user authorization for surplus registration and surplus approval.
- > Can manage single locations or multiple locations at the same time.
- > Dynamic costing model to allow forecasting of SDDS costs.
- Complete tracking capability down to a single unit from initial equipment registration to the final destination of resale, donation or destruction.
- Allows for online creation and archiving of data and unit destruction certifications that comply with electronic signature and VITA ITRM security documentation requirements.
- Reports revenue returns to the Commonwealth from resale.
- Allows for the import and export of data to and from other asset tracking systems.

**Note**: Use of the SDDS system is mandatory to use the SDDS contract. DynTek must provide a universal surplus tracking system to the Commonwealth. Use of this system is the only means to cover this commitment.

# **How the SDDS Program Works**

Anyone would think that the surplus of a computer or other technology device is fairly simple. But the potential data security and ecology damage that a computer can yield is enormous. For this reason, VITA has assigned responsibility of technology surplus to AERC. Assignment of this responsibility to a 3rd party vendor allows an organization to focus on the forward momentum of its operation and not worry about items that were displaced from use. The responsibility of securing SDDS items falls to AERC and the accountability of meeting the security and ecological requirements the Commonwealth demands will be the sole responsibility of AERC and no longer that of the organization that uses the SDDS program.

The SDDS Lifecycle (Grey rows highlight what is covered in this document.)

Phase	Milestone	Description	Responsible Organization	Outcome
Phase	SDDS Registration	Organization applies to use SDDS	DGS, Requesting Organization, AERC.	Use of SDDS authorized or denied by DGS.
2	Organization Registration	Organization creates a list of locations where surplus equipment exists as well as a list of users authorized to surplus equipment in those locations.	Requesting Organization	Organization is ready to begin surplus.
3	Equipment Registration	Authorized users in local offices begin the process of registering items identified for surplus.	Requesting Organization	Unique "Batch" profile is created for administrative review. Equipment list is entered into SDDS
4	Batch Audit	Organizations Agency Administrator reviews requested surplus equipment batch and modifies, approves or denies. SDDS Cost is listed at this time.	Requesting Organization	Batch is modified to management approval. Quote generated and PO issued to AERC.
5	Collection	AERC coordinates with client to arrange collection based on the final batch list	Requesting Organization, AERC.	Collection schedule reviewed and approved. Items removed from locations.
6	Validation	AERC validates SDDS information of items that are registered and modifies any discrepancies. Organization can review any changes.	AERC	Items moved to evaluation.
7	Evaluation	Items are evaluated according to their registered information and physical review.	AERC	Items will be resold, donated or destroyed. This is based on the item meeting or failing the evaluation criteria.
8	Sanitization	Data and any other markers identifying the organization are removed.	AERC	Item is ready for redistribution or destruction. Item is certified as ready for reuse or is certified as destroyed.
9	Destination	Item is sold, donated or destroyed. Final report is available to organization.	Requesting Organization, AERC.	Billing
10	Administration	Resale revenue is returned to DGS/Organization Organization is billed for batch processing costs.	DGS, Requesting Organization, AERC.	Activity Closure

# **Contract Details**

Contract Number: VA-040917-DYNT

Issuing Authority: Virginia Information Technologies Agency

Type of use: Optional

Contract Term: 3 Years with 3 Optional 1-Year Extensions

eVA Supplier Details: AERC.Com, Inc.

116 Sylvia Road

Suite E

Ashland, VA 23005 United States

Phone: +1 (804) 798-9295 Fax: +1 (804) 798-9295

Email: amesser@aercrecycling.com

# **Contract Contacts**

#### **VITA**

Gregory Scearce Tel: (804) 416-6166

Email: gregory.scearce@vita.virginia.gov

# DGS

Joseph Thomas Tel: (804) 236-3662

Email: joe.thomas@dgs.virginia.gov

# **AERC Program Management**

Arron Messer Tel: (804) 798-9295

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# https://www.covsdds.com

You are about to begin phase 1 and 2 of the SDDS process as defined in table 1 on page 4 in this document. If you have not looked at the table, please do so now and familiarize yourself with the areas that you and your organization are responsible for. This document focuses on how to successfully register your organization into the SDDS system. Please refer to the other documents on the SDDS web-site for other activities. Each section in this document will have a phase number, a percentage of completion and identification of responsibility. This will show you where in the process you are and how close you are to completing the SDDS process for your organization.

Example: this means you are now at phase 1

Example: this means you have completed 10% of phase 1.

Example: Agency Administrator responsibility

Example: Region Administrator responsibility

Example: Surplus Equipment Member responsibility

#### **System Requirements**

The SDDS system has been designed and tested on the following software platforms and conforms to VITA minimum performance specifications:

Microsoft© Windows 98 SR2

Microsoft© Windows 2000

Microsoft© Windows XP Professional

Microsoft© Windows Vista

Microsoft© Internet Explorer 5 or higher



# **Planning your SDDS Strategy**

To take full advantage of the SDDS system, an organization should plan their surplus strategy before commencement. AERC recommends the following checklist be reviewed as well as any additional internal planning before beginning registration.

#### Checklist

Type of Review	Action Item	Description	Next Steps	Questions?
Equipment Compliance	Review Contract	http://www.vita.virginia.gov/procurement/contractDetail.cfm?contract_id=1000477	If equipment to be surplused is in-scope move ahead. If not, contact DGS to make other arrangements.	VITA, DGS
Identify locations	Internal Review	Organization pre-defines which locations will surplus.	Create a location list for the future SDDS administrator.	AERC
Identify users	Internal Review	Organization assigns administration responsibility of SDDS to one person. Region administrators and Members also identified.	Create Member list	AERC
Registration information	Internal Review	To register with SDDS. The organization will need to provide DGS with agency code, fund detail and revenue source codes.	Contact internal accounting for this information. Inaccurate information will cause rejection into the SDDS system.	DGS
Budget	Procurement	Understand the cost structure of this contract.	Review the contract	AERC
Meeting	Contact Stakeholders	Resolve any concerns and/or questions with VITA, DGS or AERC directly before commencing SDDS	Arrange meeting VITA, DGS, AERC as needed	

Once you and your organization are comfortable with moving forward with SDDS, begin the registration process.

> Open the Internet Explorer Internet Browser and go to the Internet address:

https://www.covsdds.com



Make sure there is an "S" after the http. This makes sure that you are using encryption and that access to the SDDS system is secure.



Look for a padlock icon in the bottom right of your Internet browser to confirm your secure connection.

The AERC SDDS system is always accessed from this point. After you have successfully registered, you and other users will continue to come to this homepage. However, once you have logged into the system with your unique username and password, specifics to your organization will be displayed.

### **SDDS System Home Page**



# Step 1

Click the link "Request an SDDS Account" to begin. Make sure you have the following information:

- Agency Code
- o Fund Detail
- o Revenue Source

Without this information you cannot continue. Contact DGS if you need assistance.



Up to the point that you receive approval from DGS to use the SDDS system, you do not need a username or password.



# Requesting Delegation of Authority (DOA) from DGS to Surplus

For this training manual we will begin registering and requesting authority to surplus with the following information:

Agency Name	Department of Test	State	VA
Agency Code	123	Zip Code	23219
<b>Contact Name</b>	John Doe	Contact Email	John.doe@test.virginia.gov
<b>Contact Phone</b>	804-123-1234	Agency	123
Address	123 Smith Street	Fund Detail	1234
City	Richmond	Revenue Source	99999

Organizations Request for Computer Delegation through DGS Page



To successfully complete registration, you must provide accurate information in every field.

Once you have completed the request, click "Submit" in the top left corner. Your application has now been sent to DGS for review. You will receive an Email from DGS letting you know if your application has been approved or denied.

#### **IMPORTANT**

The application to use the SDDS system must be completed by the assigned SDDS Agency Administrator. When the request is approved by DGS, the information provided to the system by your application is used to create the 1st administrator user account automatically.



The address given at registration must be the same as the billing address of the purchase order.



# Email you receive that DGS has approved your request

#### SDDS Delegation Application Approved

RC@covsdds.com [RC@covsdds.com]

Cc:

Application for Agency Delegation

John Doe

Your application for computer delegation has been Approved.

Your login credentials will be sent to you shortly via email. If you have any questions, contact Andrew Miller by Phone: (804) 521-4163 by Email: andrew.miller@dyntek.com.



Some new Email systems may see the Email sent to you as Junk Email. If you do not receive an email, check the "Junk Email" folder.



# 1 50% AA

#### Email you receive that DGS has denied your request

# SDDS Delegation Application Rejected

RC@covsdds.com [RC@covsdds.com]

Cc:

Application for Agency Delegation

John Doe

Your application for computer delegation has been Rejected.

Please contact Department of General Services at 804-236-3662 to update your information or reapply by requesting a new delegation of authority with the correct agency codes...

If your application to use SDDS is denied, contact DGS directly for help. Refer again to section: 1 30% to review information required for a successful application. Rejected applications are deleted from the system. Once you have the correct information required to begin SDDS, reapply for an SDDS account, click the link "Request an SDDS account" on the SDDS homepage again.





# E-mail you receive with your 1st username and password (After DGS approval)

SDDS User Account Created
RC@covsdds.com [RC@covsdds.com]
To:
Cc
SDDS Application Account Information
John Doe
An SDDS Account has been created for you.
Your username is JohnDoeWCB and password is WLIXNW

#### **IMPORTANT**

This username and password will govern how you work on SDDS. This user account administers the rest of your organizations SDDS operation and should only be used by someone authorized to make decisions regarding an organizations surplus. Treat this user account the same way you would treat any administrator account within your organization.

### SDDS Homepage



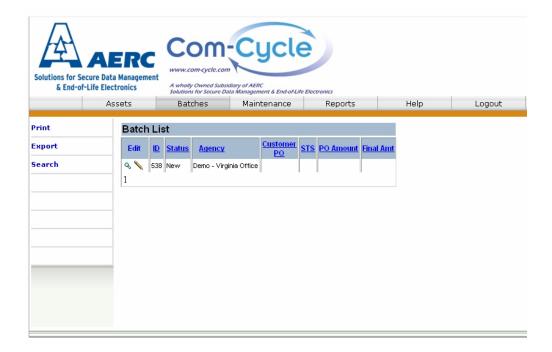
Make note of your username and password you receive via e-mail. Open your Internet Explorer and go to <a href="https://www.covsdds.com">https://www.covsdds.com</a>. Enter your username and password. Click the "Login" button when finished.



Add the SDDS web site to your favorites by using the Ctrl and D keys together when you are at the SDDS homepage. Then go to the favorites menu at the top of the Internet Explorer and choose "AERC – Secure Data Destruction and Surplus Homepage" in the future. This will bring you automatically to the SDDS homepage. You will still have to enter your username and password.



#### Batch Summary Page



Congratulations! You have entered the SDDS system. After you successfully login, you are presented with the default administration page. Additionally, your first "batch" is created for you. The batch will be empty but it will be used to register equipment later. In this case the batch ID is 102. We will go into batch management later.

The following table briefly explains each menu item displayed:

Item	Description	Function	Access Level
Print	Prints page Information	To allow batch creation reviews	AA RA M
Export	Exports batch summary to Excel	Allows local archiving of information	AA RA
Search	Search for specific batches or devices	To look at batch and device details	AA RA M
Assets	Register or review surplus equipment	Register, Review, Search, Print, Export	AA RA M
Batches	Return to default batch summary page	Lists all batches	AA RA
Maintenance	SDDS Administration	Creates/Edits Users and Facilities. Changes Passwords. Generates/Uploads New Surplus Spreadsheet.	AA RA M
Reports	SDDS Report Area	Creates reports on SDDS activity	AA
Help	Help	SDDS Help Documentation	AA RA M
Logout	Logout	Ends login and returns to SDDS Homepage	AA RA M

Become familiar with each link on this page and when done, return to the default page by clicking the "Batches" button.

# Phase Complete!



# **Facility and Member Registration**

Now that you have access to the SDDS system, you must make the system understand how your organization is setup. The SDDS system works on three main principles:

- Locations
- Users
- Batches

#### - Locations -

AERC collects thousands of units a month for surplus. To be able to complete collections efficiently, schedules are created that reflect the accurate location of equipment that is ready for surplus. When you configure SDDS for your use, you are required to register any location that will use the system. You may have 1 location or 100. Each location must be registered. When you register equipment, you will have the ability to describe where, in that location, e.g. "In Room 100", the equipment is located.

### - SDDS System Users -

Some organizations will have a few items to surplus others will have thousands. The responsibility of managing and completing a surplus project may fall to one person or many people. For this reason, you can have multiple people registered in SDDS to enter equipment into surplus and to manage the surplus activities for a geographical region. However, there will only be one main administrator who will approve, deny or modify, any items requested for surplus as well as creating Facilities, Region Administrators and/or Members

Member Type Role Description

Agency Administrator (AA) First user account created. Has complete control of the SDDS system for their organization.

Region Administrator (RA) Created to manage regions where field offices may be located. Can add/modify or delete users for their location/region. Will register equipment for surplus.

Member (M) Will register equipment for surplus. Either the Administrator or Region

Administrator creates members.

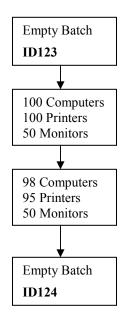


It is recommended in larger organizations that the AA only create RA's. The RA can then identify within their facility or region who will be responsible for surplus equipment registration. The RA can then create and manage their region members.

#### - Batches -

Surplus equipment batches are the center of tracking and control for SDDS. A batch can consist of one unit or thousands of units. The batch can cover multiple locations with equipment entered by multiple users. AERC sees each batch as an individual project and is accountable for 100% of the units within each batch that is approved by you. However, as long as the batch is open and unapproved, there is no interaction by AERC to collect or process the equipment. Only when the AA closes the batch by approving and issuing a purchase order that reflects the list of equipment and costs contained in the batch does AERC begin the process of collection. AERC will not collect any equipment that is not contained in a batch list. However, if multiple batches are approved to the same location, AERC will collect the equipment for each batch at once if logistically feasible.

#### **Batch process**



This is a batch that is created when your account is approved and is also automatically created after a previous batch is closed.

Members enter into the batch, surplus equipment at their location(s).

Agency Administrator audits requested surplus equipment and modifies as needed. Once the Agency Administrator approves the batch with associated costs, the Batch is closed and cannot be modified.

A new batch is then created by the system and is ready to accept new surplus equipment. Batch 123 is now ready for collection. All items in batch 123 will be tracked and accounted for until they are destroyed, resold or donated by AERC.



Before you can begin registering devices, your first action item for your organization is to create a list of your organizations facilities. The definition of a facility is:

- > A Headquarters
- > A Regional Facility
- A Regional Office not within a Regional Facility

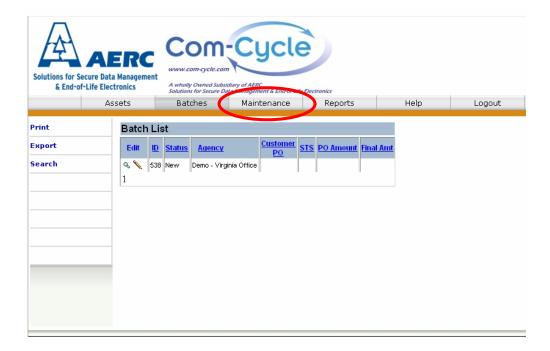
### A facility is **NOT**:

- > An office of a parent Regional Facility
- ➤ A department
- A warehouse that is part of a Facility
- ➤ A home office
- Location of any other unit that is a sub-unit to a parent location

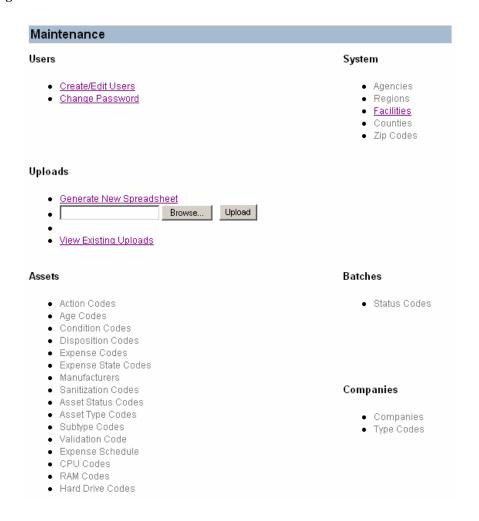


Contact AERC before you create facilities if you require assistance.

Once you have logged in to SDDS, click the "Maintenance" button at the top of the screen.



#### **Maintenance Page**

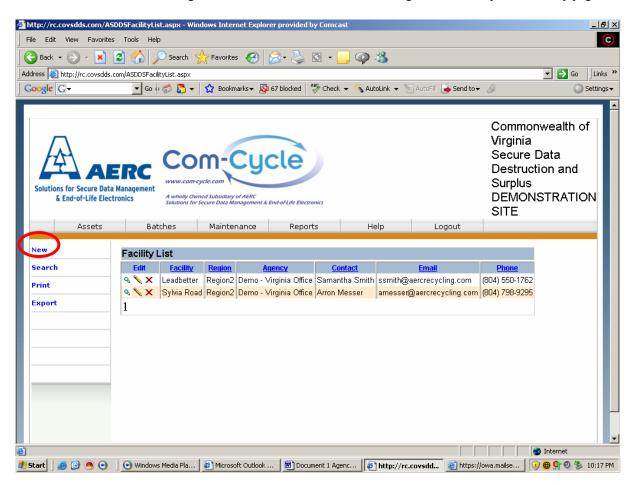


# **User Types and Functions**

- Facilities Can create/modify an organizations regional location
- Create/Edit Users Can create RA or M
- RA Create/Edit Users Can create M
- Can change own password
- Can change own password
- Can change own password
- Options that are grayed out are not available.

# 2 30% AA Creating your First Facility

Click on the "Facilities" link on the right of the Maintenance screen. You will go to the Facility list summary page.



To create your first facility, click on the "New" button.

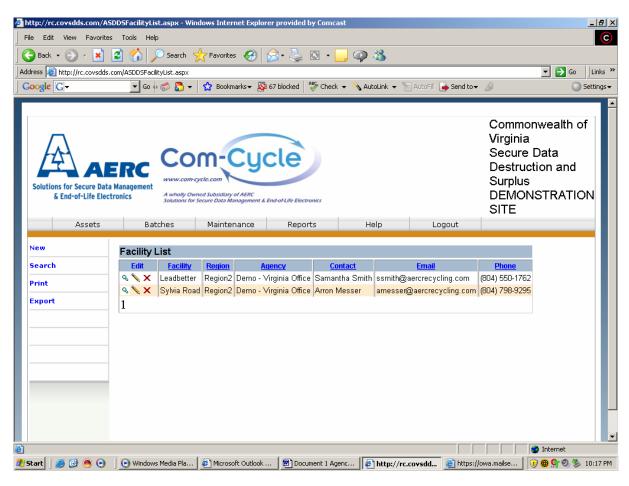
#### **Add Facility Page**



After you have clicked "New", the next page will display the above form. Fill out the form with all the details of the facility you want to register.

- Facility Name Actual name of the office where the collection will occur
- ➤ Contact Name Assigned RA to this facility/region
- Agency Will only display your organization. Cannot be modified.
- Region Region is allocated by the system after the Zip Code is entered.
- ➤ Contact Email Email address of the assigned RA
- Address 1 Physical address of the facility
- Address 2 Use only if needed
- State Defaults to VA. Out of state surplus is by special arrangement only.
- Zip IMPORTANT. Every Virginia Zip Code is listed here. You must choose the right Zip code for the facility. Confirmation of the city for that Zip Code will appear in the "City" field after the Zip code is chosen. If the city is incorrect, choose the correct Zip code. AERC creates its collection schedule based on Zip and Region registration. Incorrect listings will cause delays and possibly additional fees.

Once you are satisfied that your facility is correct, click the "Save" button on the left.





The facility list now shows the new facility you created. You will still have the ability to view and make changes to the facility by using these icons in the "Edit" field of the facility list. Any other facilities you create will also be listed.



Try to have the facility list planned before registering facilities in SDDS so that the creation procedure can be done in one go.

#### **Icon Function in Edit Field (Universal to the SDDS System)**

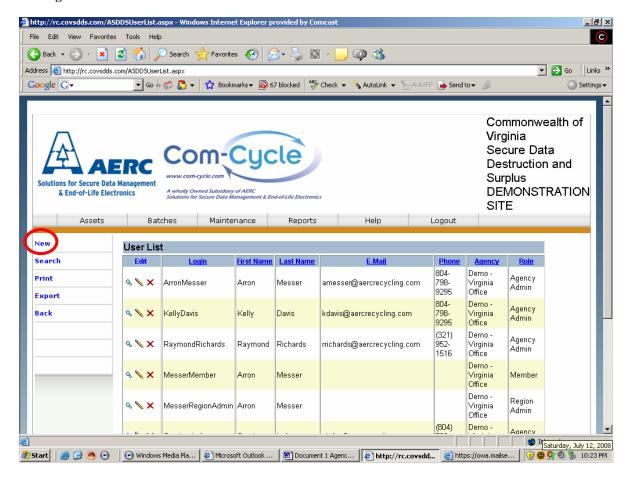
- Views a summary of the information entered. Information cannot be modified
- Views a summary of the information entered and gives the person the ability to modify that information, if the user security level allows modifications.
- Deletes the entry. Note: An entry cannot be deleted after an item is either registered and attached to a facility or is a component of a closed batch.

# 2 50% AA RA Creating Region Administrators and Members

Now that you have the facilities created, the next step is to create the Region Administrators (RA) and Members (M). As mentioned earlier, larger organizations may want to delegate the creation of Members to the Region Administrators. For this training manual we will create RA's for both facility locations and then an RA will create a member. The Agency Administrator can add/modify or delete any account in the system. The RA can add/modify or delete any Member. The Member cannot change any user information.

- ➤ Login to SDDS as the Agency Administrator
- Click "Maintenance"
- Click "Create/Edit Users"

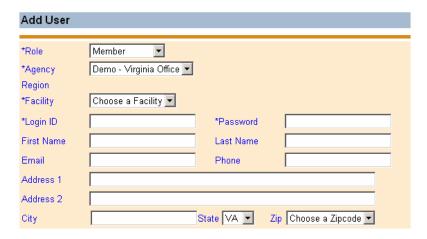
#### **User List Page**



In the User List Page, there will already be one user created. This is the Agency Administrator account that was created by the system when your request for delegation of authority to surplus by DGS was approved. Now you want to create a new RA account.

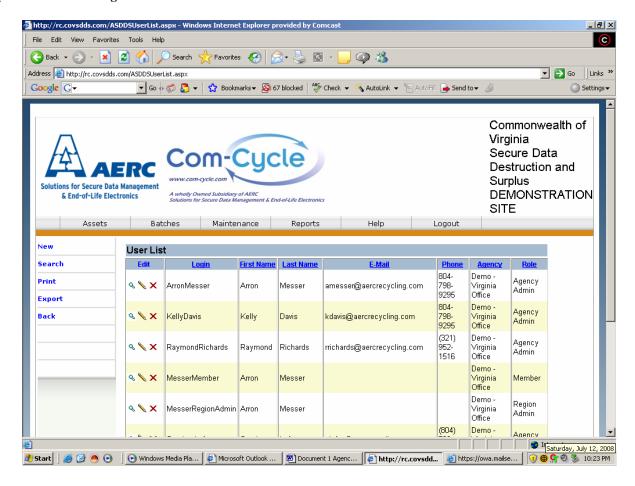
- ➤ Click on the "New" button on the left
- Make sure the "Region Admin" option is chosen in the Role drop-down menu

#### **Add User Page**



The add user page lets you create the users that will assist you with your SDDS project. All fields must be filled out correctly. The address and Zip of the RA must correspond to a facility or region that he/she will be responsible for. This will let the SDDS system recognize automatically which region the RA can manage. Once you have entered the information needed, click the "Save" button on the left.

#### **Updated User List Page**



The user you created will now display on the User List Page. For example, a Region Admin login was created for Arron Messer.

#### **Account Creation Notification**



After a username/login is created, the user will receive an email notifying that an SDDS account has been created.

The AA will continue to create RA's for each region until all facilities and regions are covered.



There can be multiple RA's for each region. However, if the same person is to be an RA for more than one region, they must have an additional user account created to reflect the additional regions they will cover.

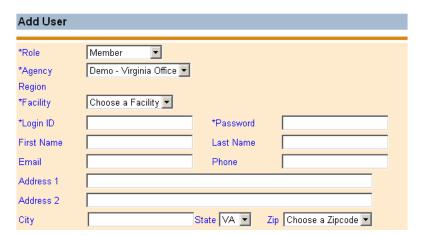


You are now ready to create members.



Remember that an RA can only create members for their own region. An AA can create members for all regions.

- ➤ Go to https://www.covsdds.com.
- > Login with your username and password.
- > Click on the Maintenance button.
- Click the "Create/Edit users" link.
- > Click the "New" button on the left.
- Make sure the "Member" option is chosen in the Role drop-down menu.
- ➤ Once you have entered all the information, click the "Save" button on the left.



A Members registration will be different from a Region Administrators registration page. The "Facility" option will only show the facilities assigned to each Region Administrator if the Region Administrator is creating a Member. The "Role" option will only show Member for the Region Administrator. For the Agency Administrator, all facilities and roles are available. The Member will receive an email that tells them that an account has been created for them. The member can then begin the process of device registration for surplus. Please refer to the device registration document for guidance on the correct registration of surplus equipment.

The AA and RA can now continue to register as many people as needed to successfully work in the SDDS system.

#### **Password Management**



Once the RA or M receives notification that they have been assigned an SDDS account they must login into the SDDS system and customize their password for security purposes. This also applies to Agency Administrators and Members

- ➤ Go to https://www.covsdds.com.
- Enter the username and password given in the Email notification.
- > At the next page, click the "Maintenance" button.
- ➤ Click the "Change Password" link.



#### **IMPORTANT**

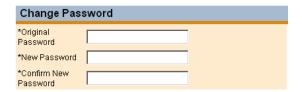
VITA Security standards require you to have a minimum 8 character alphanumeric password.

Examples:

Password: 12345678 – Wrong

abcdefghi – Wrong abcd1234 – Wrong

Qh2U57Cb - Correct Format Example



- > Enter in the password given by email in the first field.
- Type in the new password in the second field.
- > Retype the new password in the third field.
- > Click the "Save" button when you are finished.
- Click the "Logout" button to go back to the SDDS Homepage.
- Enter your username and new password to go back into the SDDS system.

#### **Forgotten Passwords**

If you forget your password, please contact the AERC Program Manager to have your password reset.



#### - Summary -

Responsibility	Milestone	SDDS Location	Output
Responsibility	Create Facilities	Login, Maintenance, Facilities	SDDS Locations Identified
AA	Create RA's	Login, Maintenance, Create/Edit Users	Regional Administrators
AA RA	Create Members	Login, Maintenance, Create/ Edit Users	Members